

MyIntealth™ Applicant User Guide: Electronic Portfolio of International Credentials (EPICSM)

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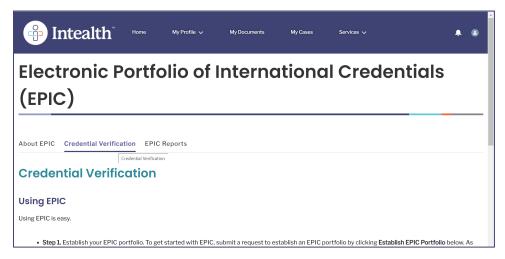
1 Electronic Portfolio of International Credentials (EPIC)

1.1 Submit Request to Establish Your EPIC Portfolio

Step 1. From the **MyIntealth Applicant Portal** homepage, in the top banner, click **Services** and then click **EPIC** from the resulting dropdown.



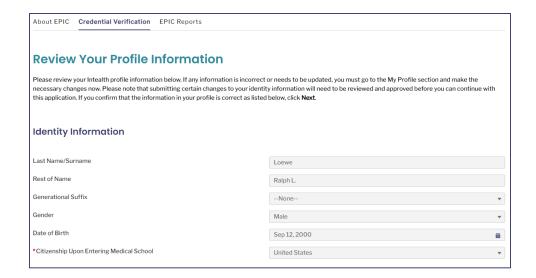
Step 2. Click the **Credential Verification** tab.



Step 3. Click **Establish EPIC Portfolio** at the bottom of the screen.



Step 4. Review your profile information and, if accurate, click **Next** and continue to the **Organization(s) to Which I Am Applying** section.



a. If edits need to be made to the **Identity Information** and/or **Contact Information** sections, click **Cancel**. Then, make any necessary edits by opening the **My Profile** tab → **Identity Information** or **Contact Information** pages.



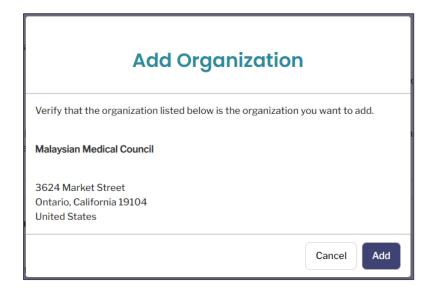
1.1.1 Organization(s) to Which I Am Applying

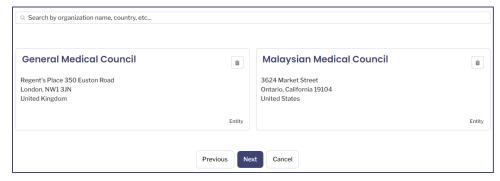
Step 1. Search for the organization(s) to which you are applying.



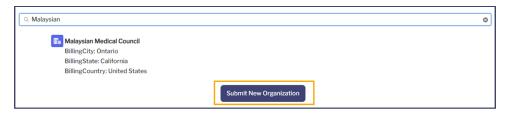
Step 2. Once you begin typing in the search field, choices appear. Click on the organization(s) you want to include and click **Add** to add that organization to your list.

Note: Any selected (or previously added during the **MyIntealth Account Establishment** process) organizations appear at the bottom of the screen.





a. Click **Submit New Organization** if you cannot find the organization you are looking for and follow the on-screen prompts accordingly.

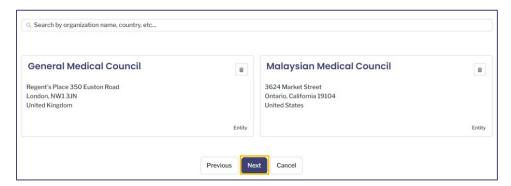


b. If you are unsure which organizations you want to include, click I do not know to which organization(s) I plan to send EPIC reports.

Note: Choosing this option removes any previously selected entities/organizations from the bottom display and the search bar disappears. Prior to making this change, a pop-up box warning of this action displays. Click **Ok**.



Step 3. Once you have added all organizations, click **Next** at the bottom of the screen, and continue with the **Complete the Attestation by Applicant** section.



1.1.2 Complete the Attestation by Applicant

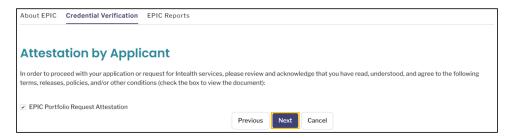
Step 1. Click the **EPIC Portfolio Request Attestation** checkbox and review the subsequent documentation.



Step 2. Review the documentation and click **Accept**. You may also download or print this file.



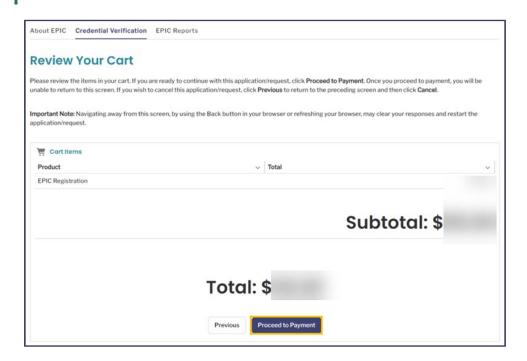
Step 3. Click **Next** and continue with the **Complete Review Your Cart** section.



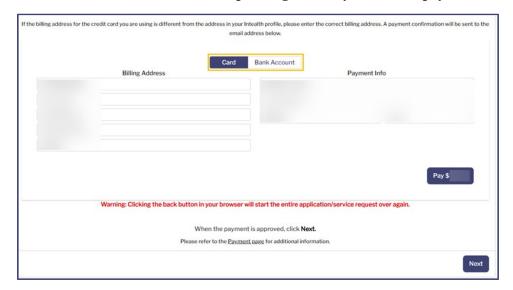
1.1.3 Complete Review Your Cart

Step 1. Review the items and subtotal cost of your cart. Once ready to continue, click **Proceed to Payment**.

Note: To return to any prior screens, click **Previous**. As stated on the screen, if you navigate away from this screen using your browser's **Back** button or if you refresh your browser page, your responses may clear, and you will need to restart the application/request.



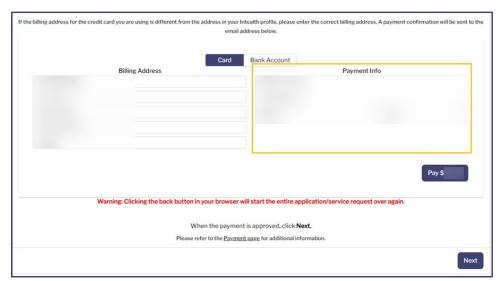
Step 2. Click **Card** or **Bank Account** (depending on how you want to pay for the service).



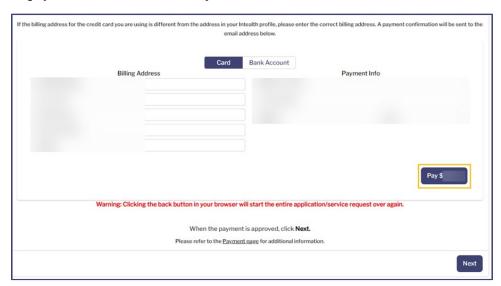
Step 3. Confirm/update the **Billing Address** information.



Step 4. Enter the **Payment Info** according to the **Card** or **Bank Account** option you selected.



Step 5. To pay for the service, click **Pay \$**.



- **Step 6.** When your payment is successfully processed, a **Thank You!** confirmation notification appears, and an email confirmation is sent to your email on file. Click **Next** to continue.
 - a. It is recommended to document your case number for this request. It helps the Intealth advisors locate your case, if necessary.



Step 7. The **MyIntealth Applicant Portal** homepage appears.

1.2 Upload Credentials to Your EPIC Portfolio for Verification

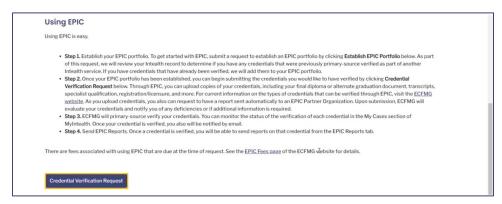
Step 1. From the **MyIntealth Applicant Portal** homepage, in the top banner, click **Services**, and then select **EPIC** from the dropdown menu.



Step 2. The Electronic Portfolio of International Credentials (EPIC) page appears. Click the Credential Verification tab.



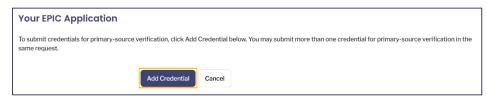
Step 3. Review the information related to **Using EPIC**. Click **Credential Verification Request**.



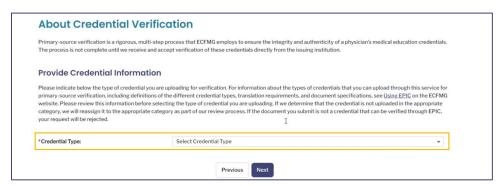
Step 4. The **Add Credential** page opens. If you are applying to an EPIC Partner Organization, click the link to review the special instructions.



Step 5. In the **Your EPIC Application** section, click **Add Credential**.



Step 6. The **About Credential Verification** page opens. Select the type of credential you are uploading from the **Credential Type** dropdown menu.



Enter any additional required information (*) that appears because of your selected
 Credential Type.

Note: In the example below, the additional required information results from selecting **Final Medical School Transcript**.



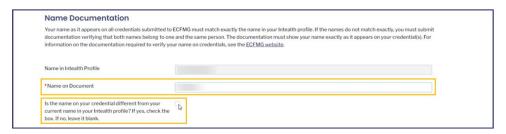
- **Step 7.** If you are required to **Upload a Credential**, use the following instructions.
 - a. Click **Upload Files** and follow the onscreen instructions to select a file.



b. A preview of the file appears. Click **Save** (disk icon) in the right corner to save the file.



- c. The file is saved.
- **Step 8.** In the **Name Documentation** section, enter the **Name on Document** and determine if it is different than the name shown in **Name in Intealth Profile**.



- a. If the name on your credential *is different* from the name shown in **Name in Intealth Profile**, click the checkbox.
 - (1) Upload the **Name Documentation** to support the name difference, using the instructions shown above for uploading a file.



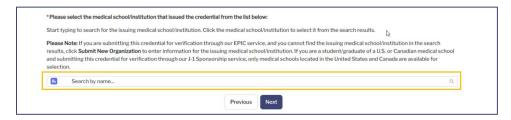
Step 9. In the **Credential Translation** section, determine if the credential is in a language other than English.



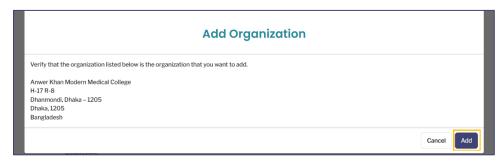
- a. If the credential is in a language other than English, click the checkbox.
 - (1) Upload the **Credential Translation (if not in English)** using the instructions shown above for uploading a file.



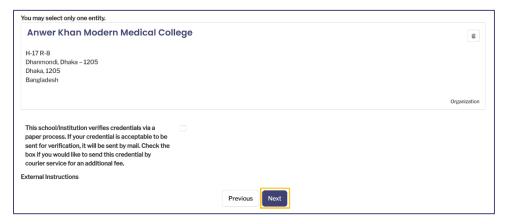
Step 10. Using **Search by name**, enter/select the medical school or institution that issued the credential.



- a. Type the name of the school or institution in the search bar.
- b. Select the school.
- c. The **Add Organization** pop-up appears. Click **Add**.



Step 11. Click Next.



Text appears stating how the credential is sent for verification for this specific school/institution.

Step 12. Determine if you want to **Send Report to an EPIC Partner Organization Automatically**.

- a. If so, use **Search by name** to enter/select the EPIC Partner Organization.
 - (1) If you choose to send an EPIC Report to an EPIC Partner Organization, a field will appear with the option to provide a Reference/Identification Number for the organization.



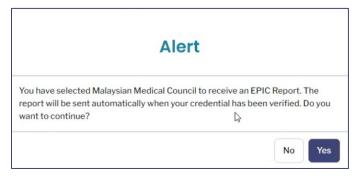
b. If not, click the checkbox.



Step 13. Click Confirm.



a. If you selected to send the report to an **EPIC Partner Organization**, an **Alert** pop-up message appears reminding you of that selection. Click **Yes** to continue.



Step 14. The **Add Credential** page displays again. The information you recently confirmed appears in the **Your EPIC Application** section.

1.2.1 Upload Additional Credentials

At this stage, you may add an additional credential by clicking **Add Credential**. You may also **Edit**, **Remove**, or **Remove Recipient** from the previously confirmed information by clicking the icons within that row.



Step 1. Click **Next**.



Step 2. The Credential Verification Request Summary page appears. Review the information and click **Next** at the bottom of the screen.



Step 3. The Attestation by Applicant page appears. Click the Request for Credential Verification Attestation checkbox to review the attestation information.



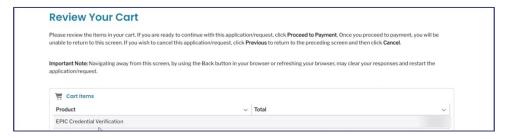
Step 4. The **Request for Credential Verification Attestation** pop-up appears. Review the information and click **Accept**.



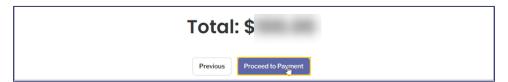
Step 5. Click Next.



Step 6. The **Review Your Cart** page appears with an overview of your **Cart Items**.



Step 7. Click **Proceed to Payment** at the bottom of the screen.



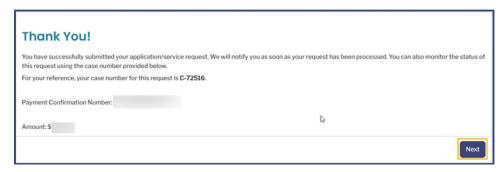
Step 8. Select your payment method, **Card** or **Bank Account**, and enter the required information in the subsequent sections.



Step 9. Once all information has been entered, click Pay \$.



Step 10. When the payment is successfully processed, a **Thank You!** confirmation message appears, and an email confirmation is sent to your email address on file. Click **Next** to finish.



Note: It is recommended that you document your case number (**C-#**) for this request. It may be useful if you need an Intealth Advisor to locate your case quickly.

Step 11. The **MyIntealth Applicant Portal** homepage displays again. Click **My Cases** to review the submitted information.



Step 12. The **My Case Requests** page opens. Scroll to locate the **Case Number** referenced on the **Thank You!** notification.



1.3 EPIC Reports

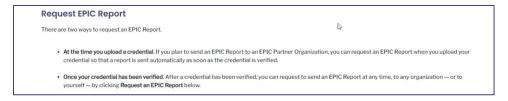
- 1.3.1 Request an EPIC Report Be Sent to EPIC Partner Organization
 - **Step 1.** Click **Services** in the top banner and select **EPIC** from the dropdown.



Step 2. The **Electronic Portfolio of International Credentials (EPIC)** page appears. Click the **EPIC Reports** tab.



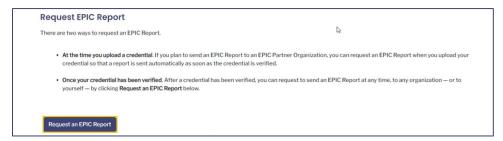
Step 3. Scroll to the **Request EPIC Report** section. Review the information regarding the ways to request an **EPIC Report**.



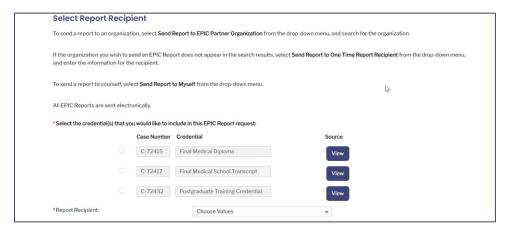
Note: The **EPIC Report History** is also available for review.



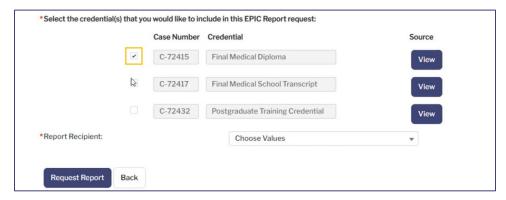
Step 4. Click **Request an EPIC Report**.



Step 5. The **Select Report Recipient** page opens. Select the credentials that you want included in this EPIC Report request using the following instructions.

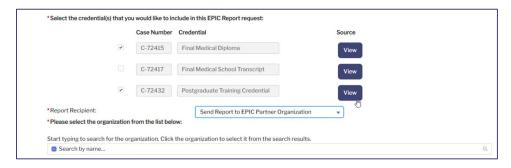


a. Click the checkbox(es) for the credential(s) you want included.

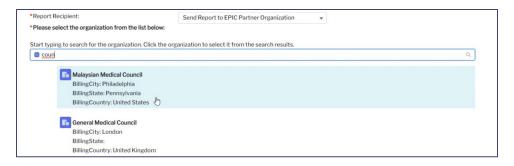


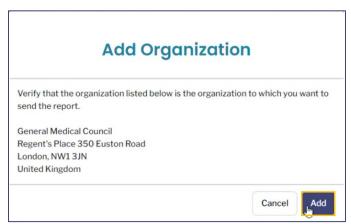
Only credentials that have already been successfully verified should be included in the EPIC Report request.

b. In the **Report Recipient** field, select **Send Report to EPIC Partner Organization** from the dropdown.

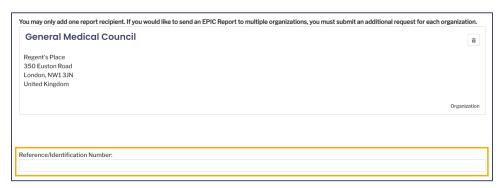


c. Search for and select an organization. Click **Add** to select the organization as a report recipient.





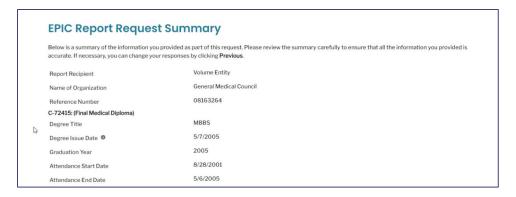
d. You will also have the option to provide a **Reference/Identification Number** for the organization.



e. Click **Request Report**.



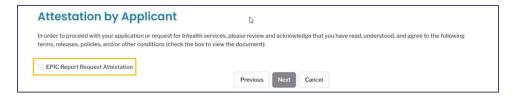
Step 6. The **EPIC Report Request Summary** page appears. Review this information.



Step 7. Scroll to the bottom of the page and click **Next**.



Step 8. The **Attestation by Applicant** page appears. Click the **EPIC Report Request Attestation** checkbox.



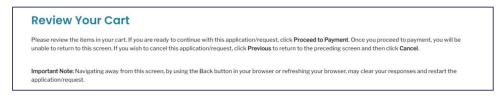
Step 9. The **EPIC Report Request Attestation** appears. Review the attestation and click **Accept**.



Step 10. Click Next.



Step 11. The **Review Your Cart** page opens with an overview of your **Cart Items**.



Step 12. Scroll down and click Proceed to Payment.



Step 13. Select your payment method, **Card** or **Bank Account.** Enter your payment information into the subsequent sections.



Step 14. Once you have entered all information, click **Pay \$**.



- **Step 15.** Once the payment is successfully processed, a **Thank You!** message appears, and an email confirmation is sent to your email address on file.
 - a. It is recommended to document your case numbers (**C-#**) for this request. It can help MyIntealth advisors quickly locate your case.



Step 16. Click **Next** to complete the application and return to the **MyIntealth Applicant Portal** homepage.

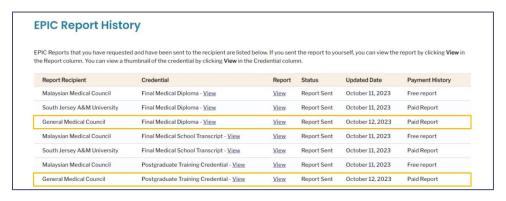
Step 17. To review the report request, click **Services** in the top banner, and select **EPIC** from the dropdown menu.



Step 18. The **Electronic Portfolio of International Credentials (EPIC)** page appears. Click the **EPIC Reports** tab.



Step 19. The **EPIC Report History** section appears and now shows your most recent requests.



1.3.2 Request an EPIC Report Be Sent to One-Time Report Recipient

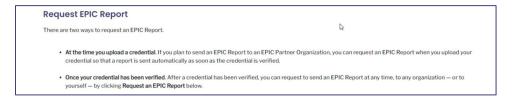
Step 1. Click **Services** in the top banner and select **EPIC** from the dropdown menu.



Step 2. The Electronic Portfolio of International Credentials (EPIC) page appears. Click the EPIC Reports tab.



Step 3. Scroll to the **Request EPIC Report** section. Review the information for ways to request an **EPIC Report**.



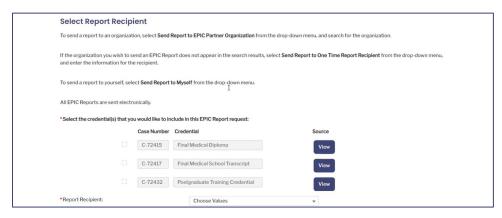
Note: The EPIC Report History is also available for review.



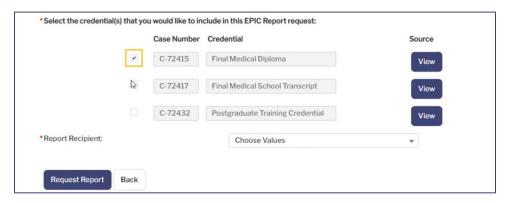
Step 4. Click **Request an EPIC Report**.



Step 5. The **Select Report Recipient** page opens. Select the credentials you want to include in this EPIC Report request by using the following instructions:

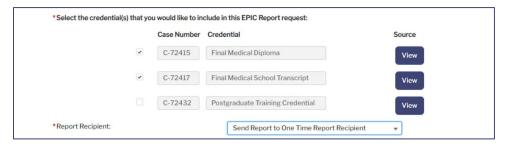


a. Click the checkbox(es) for the credential(s) you want to include.

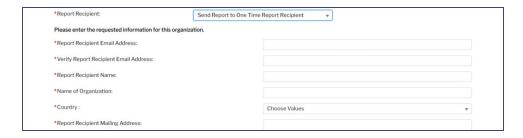


Only credentials that have already been successfully verified should be included in the EPIC Report request.

b. In the **Report Recipient** field, select **Send Report to One Time Report Recipient** from the dropdown.



c. More fields appear based on your selection. Enter information for all required fields (*).



d. Click **Request Report**.



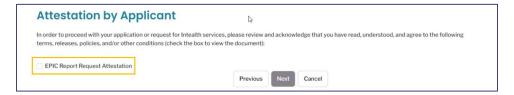
Step 6. The **EPIC Report Request Summary** page appears. Review this information.



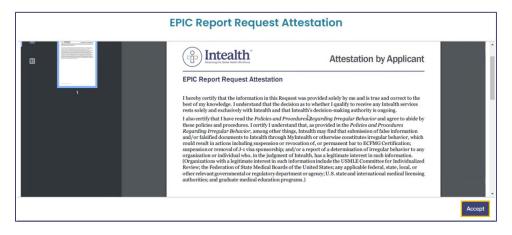
Step 7. Scroll to the bottom of the page and click **Next**.



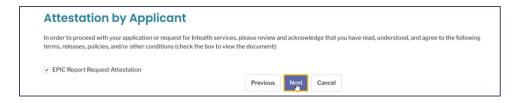
Step 8. The **Attestation by Applicant** page appears. Click the **EPIC Report Request Attestation** checkbox.



Step 9. The **EPIC Report Request Attestation** appears. Review the attestation and click **Accept**.



Step 10. Click Next.



Step 11. The **Review Your Cart** page opens with an overview of the **Cart Items**.



Step 12. Scroll down and click **Proceed to Payment**.



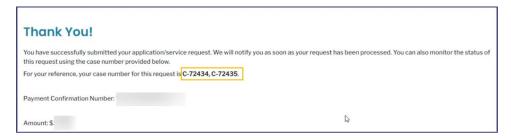
Step 13. Select your payment method, **Card** or **Bank Account.** Enter the payment information into the subsequent sections.



Step 14. Once you have entered all information, click Pay \$.

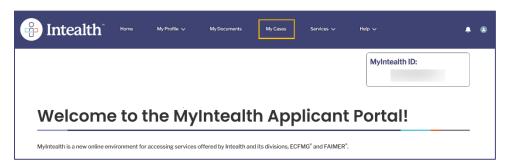


- **Step 15.** Once the payment is successfully processed, a **Thank You!** message appears, and an email confirmation is sent to your email address on file.
 - a. It is recommended to document your case numbers (**C-#**) for this request. It can help MyIntealth advisors quickly locate your case.

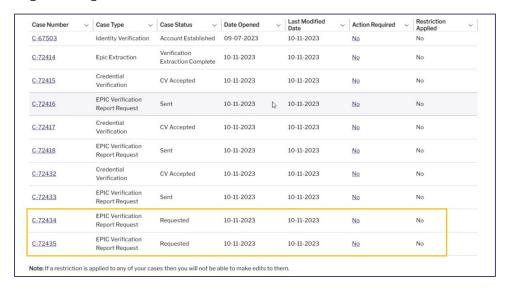


Step 16. Click **Next** to complete the application and return to the **MyIntealth Applicant Portal** homepage.

Step 17. To review your submitted request, click **My Cases** in the top banner.



Step 18. The **My Case Requests** list appears. This list now includes your **EPIC Verification Report Request(s)**.



1.3.3 Request an EPIC Report Be Sent to Myself

Step 1. Click **Services** in the top banner and select **EPIC** from the dropdown.

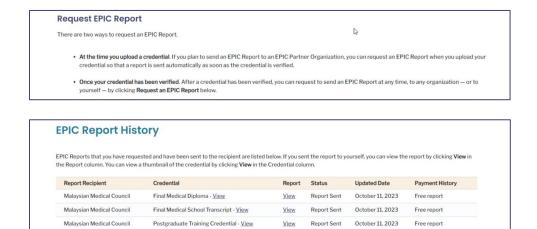


Step 2. The **Electronic Portfolio of International Credentials (EPIC)** page appears. Click the **EPIC Reports** tab.



Step 3. Scroll to the **Request EPIC Report** section. Review the ways to request an **EPIC Report**.

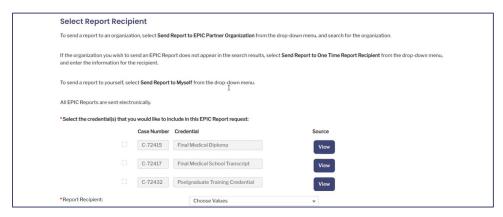
Note: The EPIC Report History is also available for review.



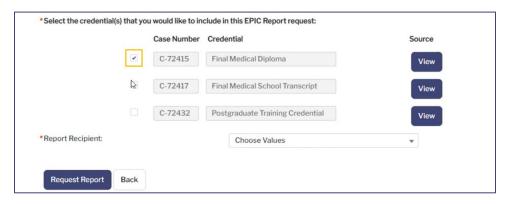
Step 4. Click **Request an EPIC Report**.



Step 5. The **Select Report Recipient** page opens. Select the credentials that you want included in this **EPIC Report** request by using the following instructions.

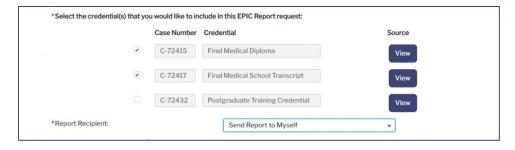


a. Click the checkbox(s) for the credential(s) you want to include.

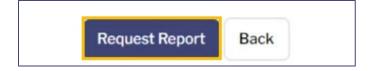


Only credentials that have already been successfully verified should be included in the EPIC Report request.

b. In the **Report Recipient** field, select **Send Report to Myself** from the dropdown.



c. Click **Request Report**.



Step 6. The **EPIC Report Request Summary** page appears. Review this information.



Step 7. Once ready, scroll to the bottom of the page and click **Next**.



Step 8. The Attestation by Applicant page appears. Click the EPIC Report Request Attestation checkbox.



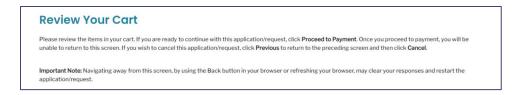
Step 9. The **EPIC Report Request Attestation** document appears. Review the attestation and click **Accept**.



Step 10. Click Next.



Step 11. The **Review Your Cart** page opens with an overview of the **Cart Items**.



Step 12. Scroll down and click **Proceed to Payment**.



Step 13. Select your payment method, **Card** or **Bank Account.** Enter the payment information into the subsequent sections.



Step 14. Once you have entered all information, click **Pay \$**.



- **Step 15.** Once the payment is successfully processed, a **Thank You!** message appears, and an email confirmation is sent to your email address on file.
 - a. It is recommended to document your case numbers (**C-#**) for this request. It can help MyIntealth advisors quickly locate your case.



Step 16. Click **Next** to complete the application and return to the **MyIntealth** homepage.



Step 17. To review the report request, click **Services** in the top banner, and select **EPIC** from the dropdown menu.



Step 18. The **Electronic Portfolio of International Credentials (EPIC)** page appears. Click the **EPIC Reports** tab.



Step 19. The **EPIC Report History** section appears and now shows your most recent requests. In order to view this report, refer to the <u>View History of EPIC Report Requests</u> section.



1.3.4 View History of EPIC Report Requests

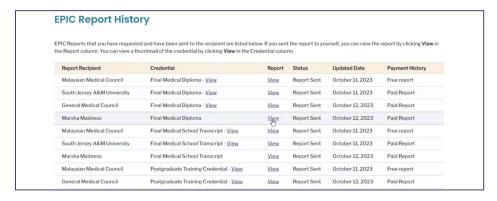
Step 1. Click **Services** in the top banner and select **EPIC** from the dropdown.



Step 2. The **Electronic Portfolio of International Credentials (EPIC)** page appears. Click the **EPIC Reports** tab.



Step 3. Scroll to the **EPIC Report History** section to review the reports sent.



a. Clicking **View** under the **Report** column may trigger an error warning: Only report recipients may access reports.



b. You are only able to view reports that you have sent to yourself.

